

PURCHASE REQUEST

A c c o u n t | B i l l i n g | S t o c k | P O S | P a y r o l l



ISV/Software Solutions



1.0 Introduction

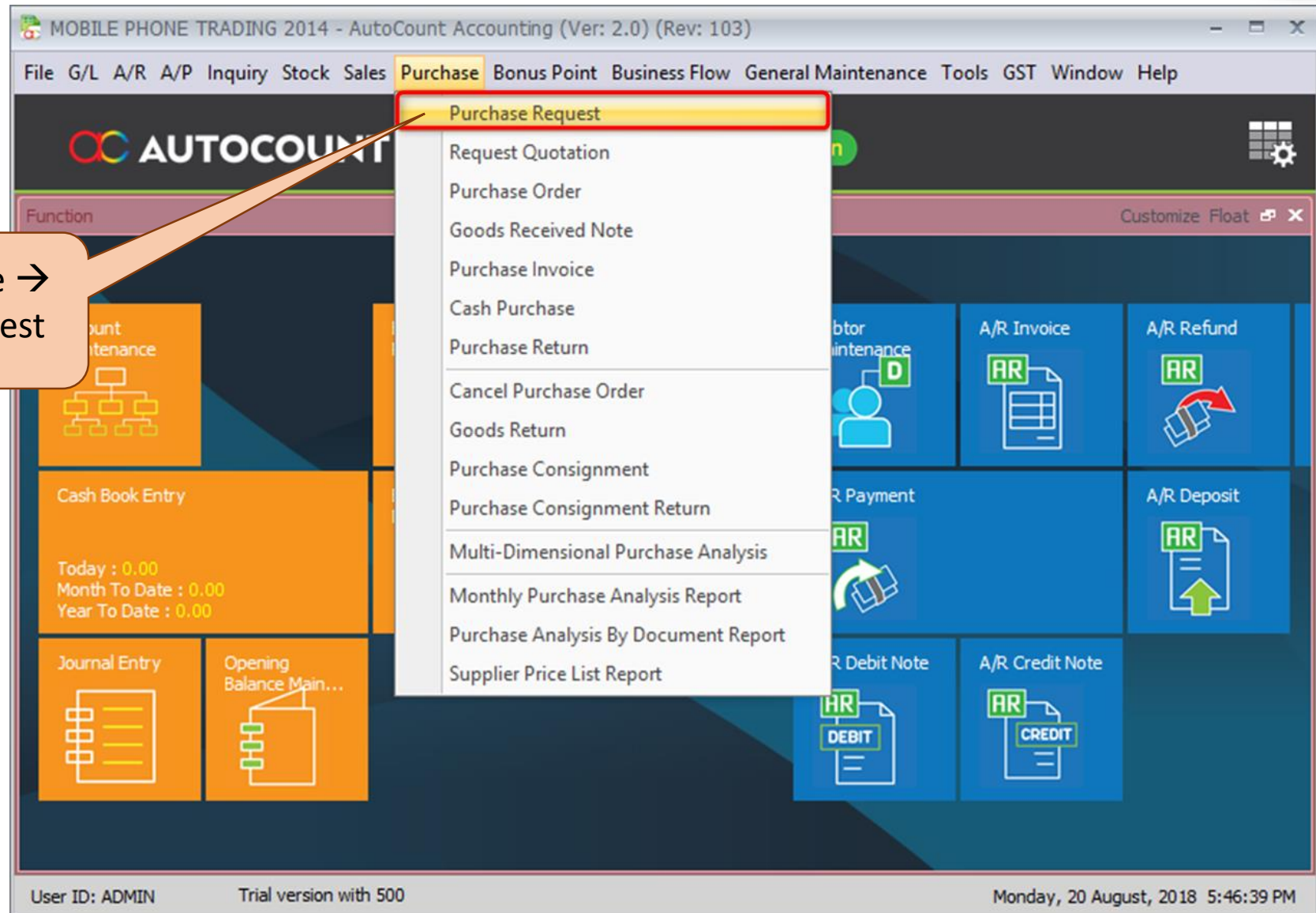
- This guide is to illustrate the functions for Purchase Request.
- Example: An internal staff is requesting stock item using the PR
- Summarized:
 - Create new PQ
 - Transfer to Other Document
 - PQ Approval

2.0 Purchase Request (PQ)

- Usually for internal staff request
- Does not deduct stock
- Does not affect accounts
- Able to transfer to:
 - Request quotation
 - PO
- Without approval, cannot transfer to other document

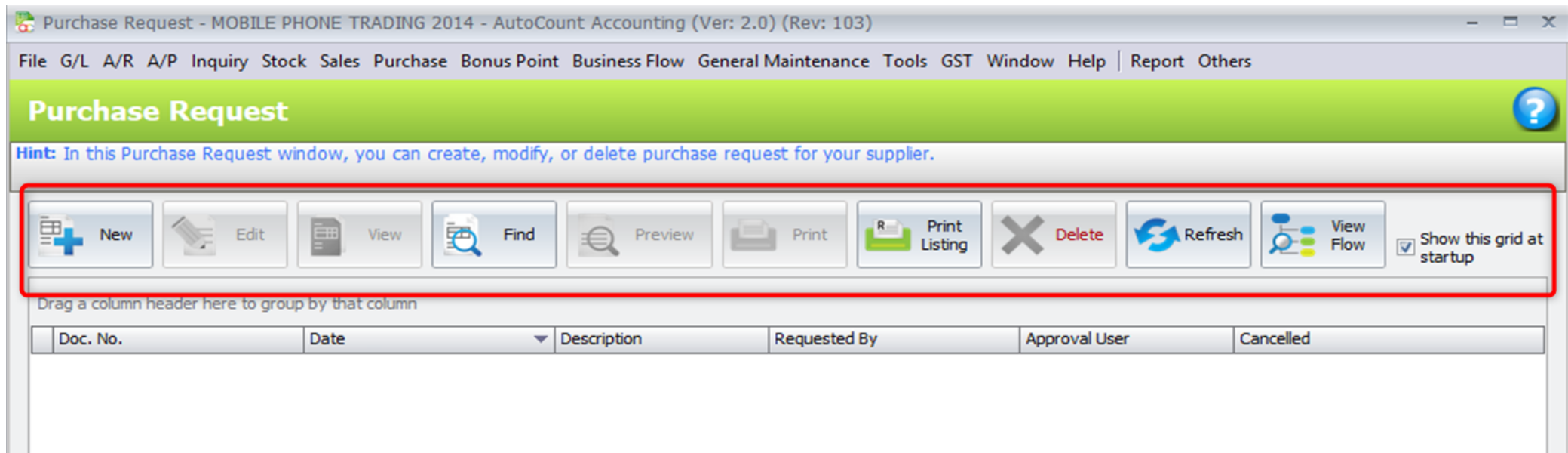
2.1 Purchase Request (PQ) Menu

Go to Purchase →
Purchase Request



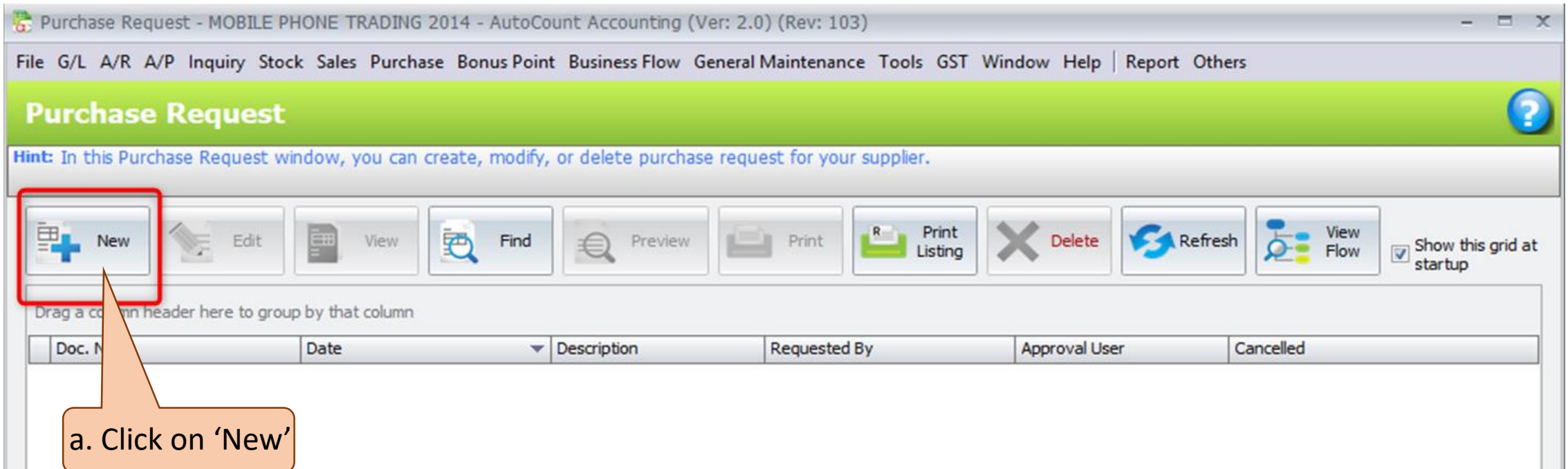
2.1 Purchase Request (PQ) Menu

- There are few functions from PQ windows
 - New, Edit, View, Find, Preview, Print Listing, Delete, Refresh, View Cash Flow



2.2. Create New Purchase Request (PQ)

- To create new PQ

The screenshot shows the 'Purchase Request' window in the AutoCount Accounting software. The window title is 'Purchase Request - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)'. The menu bar includes 'File', 'G/L', 'A/R', 'A/P', 'Inquiry', 'Stock', 'Sales', 'Purchase', 'Bonus Point', 'Business Flow', 'General Maintenance', 'Tools', 'GST', 'Window', 'Help', 'Report', and 'Others'. The main area has a green header with the title 'Purchase Request' and a blue question mark icon. Below the header is a hint: 'Hint: In this Purchase Request window, you can create, modify, or delete purchase request for your supplier.' A toolbar contains several icons: 'New' (a blue plus sign), 'Edit' (a pencil), 'View' (a document), 'Find' (a magnifying glass), 'Preview' (a magnifying glass with a document), 'Print' (a printer), 'Print Listing' (a document with a green 'R' icon), 'Delete' (a red 'X'), 'Refresh' (a circular arrow), and 'View Flow' (a flowchart icon). The 'New' button is highlighted with a red rectangle. Below the toolbar is a text prompt 'Drag a column header here to group by that column'. A table with columns 'Doc. N', 'Date', 'Description', 'Requested By', 'Approval User', and 'Cancelled' is visible. An orange callout box with a pointer to the 'New' button contains the text 'a. Click on 'New''.

2.2. Create New Purchase Request (PQ)

- Then, the layout as below will prompt:

New Purchase Request - [Next Possible No: PQ-000001](1)

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Editing

Item Search Show Instant Info Show Instant...

Copy from other Purchase Request Copy to a new Purchase Request Copy Purchase Request

Check Transferred To Status Transfer Document

Requested By

Description PURCHASE REQUEST

Purchase Location HQ

Purchase Request No <<New>>

Date 27/08/2018

Approval User

Item Code	Description	Fur...	Location	UOM	Qty	Creditor Code	Creditor Name
Purchase Request							

Record 0 of 0

☐ Proceed New P/Q

Save Save & Preview Save & Print Cancel

2.2. Create New Purchase Request (PQ)

New Purchase Request - [Next Possible No: PQ-000001]

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Editing

Item Search Show Instant Info Show Instant...

Copy from other Purchase Request Copy to a new Purchase Request Copy Purchase Request

Check Transferred To Status Transfer Document

Requested By Adam

Description PURCHASE REQUEST

Purchase Location HQ

Purchase Request No <<New>>

Date 27/08/2018

Approval User

Item Code	Description	Further Description	Location	UOM	Qty	Creditor Code	Creditor Name
> LG800	LG KE800	...	HQ	PCS			

Record 1 of 1

☐ Proceed New P/Q

Save Save & Preview Save & Print Cancel

b. Enter all required information (Requested By, Description)

2.2. Create New Purchase Request (PQ)

New Purchase Request - [Next Possible No: PQ-000001]

Home Edit

Save as Draft Save as Template Save as Recurrence Save Editing Item Search Show Instant Info Show Instant... Copy from other Purchase Request Copy to a new Purchase Request Copy Purchase Request Check Transferred To Status Transfer Document

Requested By Adam Purchase Request No <<New>> Date 27/08/2018 Approval User

Description PURCHASE REQUEST

Purchase Location HQ

Item Code	Description	Further Description	Location	UOM	Qty	Creditor Code	Creditor Name
> LG800	LG KE800	...	HQ	PCS			

Record 1 of 1

☐ Proceed New P/Q

Save Save & Preview Save & Print Cancel

c. Enter the item details
(Item Code, Qty)

2.2. Create New Purchase Request (PQ)

New Purchase Request - [Next Possible No: PQ-000001]

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Editing

Item Search Show Instant Info Show Instant...

Copy from other Purchase Request Copy to a new Purchase Request Copy Purchase Request

Check Transferred To Status Transfer Document

Requested By Adam Purchase Request No <<New>> Date 27/08/2018 Approval User

Description PURCHASE REQUEST

Purchase Location HQ

Item Code	Description	Further Description	Location	UOM	Qty	Creditor Code	Creditor Name
> LG800	LG KE800	...	HQ	PCS			

Record 1 of 1

☐ Proceed New P/Q

Save Save & Preview Save & Print Cancel

d. The Creditor Code and Creditor Name is optional

2.2. Create New Purchase Request (PQ)

New Purchase Request - [Next Possible No: PQ-000001]

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Editing

Item Search

Show Instant Info Show Instant...

Copy from other Purchase Request Copy to a new Purchase Request Copy Purchase Request

Check Transferred To Status Transfer Document

Requested By Adam Purchase Request No <<New>> Date 27/08/2018 Approval User

Description PURCHASE REQUEST

Purchase Location HQ

Item Code	Description	Further Description	Location	UOM	Qty	Creditor Code	Creditor Name
> LG800	LG KE800	...	HQ	PCS			

Record 1 of 1

☐ Proceed New P/Q

Save Save & Preview Save & Print Cancel

e. User can specify to request the item from which Creditor Code / Creditor Name

2.2. Create New Purchase Request (PQ)

New Purchase Request - [Next Possible No: PQ-000001]

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Editing

Item Search Show Instant Info Show Instant...

Copy from other Purchase Request Copy Purchase Request

Copy to a new Purchase Request

Check Transferred To Status Transfer Document

Requested By Adam Purchase Request No <<New>>

Description PURCHASE REQUEST Date 27/08/2018

Purchase Location HQ Approval User

Item Code	Description	Further Description	Location	UOM	Qty	Creditor Code
> LG800	LG KE800	...	HQ	PCS		

Record 1 of 1

Proceed New P/Q

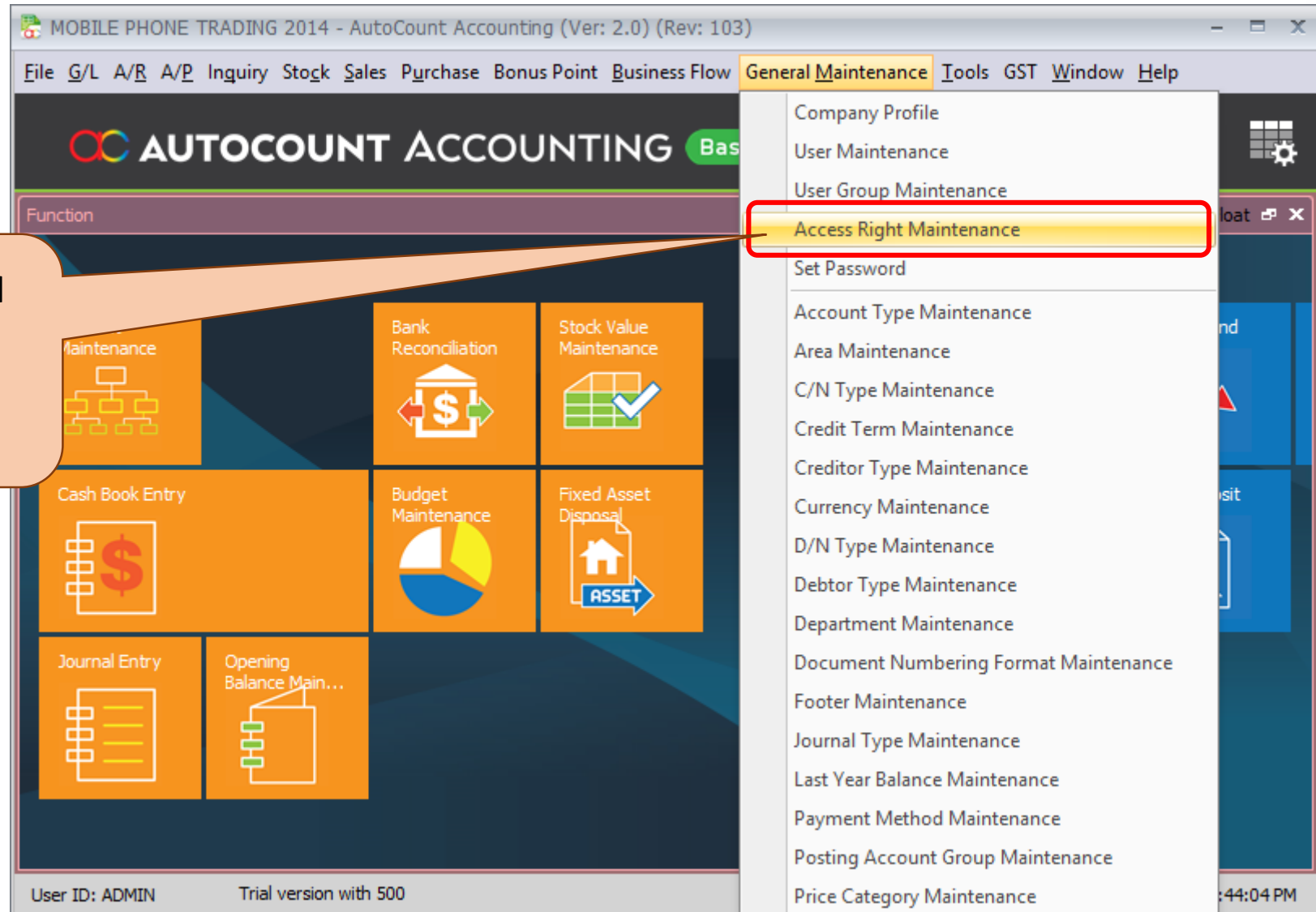
Save Save & Preview Save & Print Cancel

f. Approval User only updated if the Created user has Approval access right

2.3. Approval Access Right

- Access right for approval

i. 1. Go to General Maintenance → Access Right Maintenance



2.3. Approval Access Right

- Access right for approval

ii. Then, expand it up to Approve Purchase Request

Access Rights Maintenance - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help

Access Rights Maintenance

Search Compare Expand All

Description	Users & Groups
AutoCount Accounting	
General Ledger	
Account Receivable	
Account Payable	
Invoicing	
Sales	
Purchase	
Purchase Request	
Show Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Open Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Create Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Edit Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
View Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Approve Purchase Request	ADMIN, INVMGR
Automatic Approve Purchase Request	ADMIN, INVMGR
Delete Purchase Request	ADMIN, ADMINS, INVMGR
Can Cancel / Uncancel Purchase Request	ADMIN, ADMINS, INVMGR
Can Edit Document No	ADMIN, ADMINS, INVMGR
Can Change Document No Format	ADMIN, ADMINS, INVMGR
Show Instant Info	ADMIN, ADMINS, INVMGR, PURCHASES
Can Edit Items that were transferred	ADMIN, ADMINS, INVMGR
Purchase Request Report	
Purchase Request Listing Report	
Purchase Request Detail Listing Report	
Outstanding Purchase Request Listing Re...	
Outstanding Purchase Request Detail Listi...	
Printed Purchase Request	
Request For Quotation	
Purchase Order	
Goods Received Note	

Set Access Rights

Apply Cancel

Select All Clear All

- ☐ ACCOUNTS
- ☐ ADMINS
- ☐ FINANCEMGR
- ☒ INVMGR
- ☐ PURCHASES
- ☐ SALES
- ☐ STOCKS
- ☒ ADMIN
- ☐ AOTG
- ☐ User

2.3. Approval Access Right

- Access right for approval

Access Rights Maintenance - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help

Access Rights Maintenance

Search Compare Expand All

Description	Users & Groups
AutoCount Accounting	
General Ledger	
Account Receivable	
Account Payable	
Invoicing	
Sales	
Purchase	
Purchase Request	
Show Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Open Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Create Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Edit Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
View Purchase Request	ADMIN, ADMINS, INVMGR, PURCHASES, User
Approve Purchase Request	ADMIN, INVMGR
Automatic Approve Purchase Request	ADMIN, INVMGR
Delete Purchase Request	ADMIN, ADMINS, INVMGR
Can Cancel / Uncancel Purchase Request	ADMIN, ADMINS, INVMGR
Can Edit Document No	ADMIN, ADMINS, INVMGR
Can Change Document Format	ADMIN, ADMINS, INVMGR
Show Items that were transferred	ADMIN, ADMINS, INVMGR, PURCHASES
Purchase Request Report	ADMIN, ADMINS, INVMGR
Purchase Request Listing Report	
Purchase Request Detail Listing Report	
Outstanding Purchase Request Listing Report	
Outstanding Purchase Request Detail Listing Report	
Printed Purchase Request	
Request For Quotation	
Purchase Order	
Goods Received Note	

Set Access Rights

Apply Cancel

Select All Clear All

- ☐ ACCOUNTS
- ☐ ADMINS
- ☐ FINANCEMGR
- ☒ INVMGR
- ☐ PURCHASES
- ☐ SALES
- ☐ STOCKS
- ☒ ADMIN
- ☐ AOTG
- ☐ User

iii. Now, only ADMIN and INVMGR has the access right

2.4. Example

- For example, there are two users create PR;
 - PQ-000001: created by ADMIN (with approval access right)
 - PQ-000002: created by USER (without approval access right)

Purchase Request - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help | Report Others

Purchase Request

Hint: In this Purchase Request window, you can create, modify, or delete purchase request for your supplier.

New Edit View Find Preview Print Print Listing Delete Refresh View Flow Show this grid at startup

Drag a column header here to group by that column

	Created User	Doc. No.	Date	Description	Requested By	Approval User	Cancelled
>	ADMIN	PQ-000001	17/08/2018	PURCHASE REQUEST	Adam	ADMIN	
	USER	PQ-000002	18/08/2018	PURCHASE REQUEST	Mark		

2.4.1 Example 1

- PQ-000001: created by ADMIN (with approval access right)

i. Select the PQ

Purchase Request - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help | Report Others

Purchase Request

Hint: In this Purchase Request window, you can create, modify, or delete purchase request for your supplier.

New Edit View Find Preview Print Print Listing Delete Refresh View Flow Show this grid at startup

Drag a column header here to group by that column

Created User	Doc. No.	Date	Description	Requested By	Approval User	Cancelled
> ADMIN	PQ-000001	27/08/2018	PURCHASE REQUEST	Adam	ADMIN	
USER	PQ-000002	28/08/2018	PURCHASE REQUEST	Mark		

2.4.1 Example 1











ii. Click on View

Purchase Request - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help | Report Others

Purchase Request

Hint: In this Purchase Request window, you can create, modify, or delete purchase request for your supplier.

 New  Edit  View  Find  Preview  Print  Print Listing  Delete  Refresh  View Flow ☐ Show this grid at startup

Drag a column header here to group by that column

	Created User	Doc. No.	Date	Description	Requested By	Approval User	Cancelled
>	ADMIN	PQ-000001	27/08/2018	PURCHASE REQUEST	Adam	ADMIN	
	USER	PQ-000002	28/08/2018	PURCHASE REQUEST	Mark		

2.4.1 Example 1

View Purchase Request - [PQ-000001]

Home Edit

Preview Print Edit Void Delete Show Instant Info Document Navigation Copy from other Purchase Request Copy to a new Purchase Request Check Transferred To Status Transfer Document

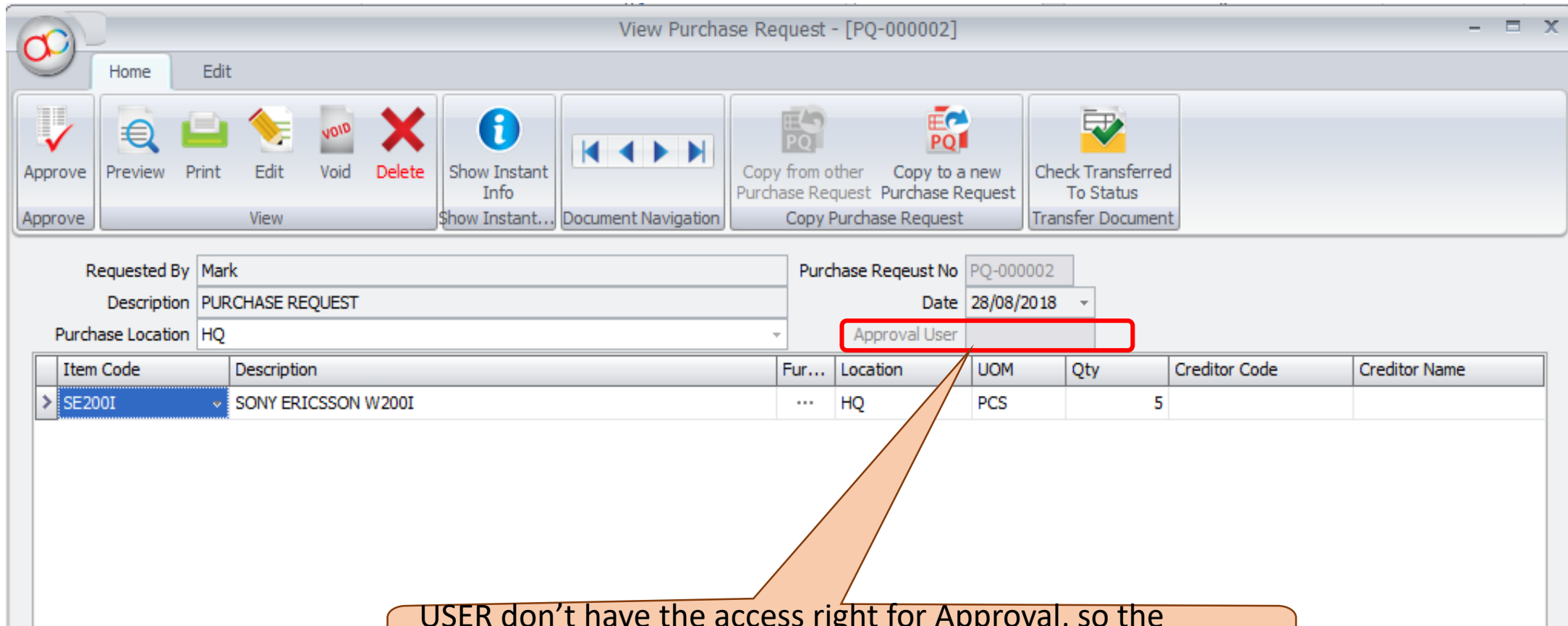
Requested By Adam Purchase Request No PQ-000001
Description PURCHASE REQUEST Date 27/08/2018
Purchase Location HQ Approval User ADMIN

Item Code	Description	Fur...	Location	UOM	Qty	Creditor Code	Creditor Name
> LG800	LG KE800	...	HQ	PCS	1		

iii. Since ADMIN is have the access right for approval, so the Approval User box is updated automatically

2.4.2 Example 2

- i. PQ-000002: created by USER (without approval access right)
 - Follow steps (i) to (iii) in **2.5.1 Example 1** to View the approval user



View Purchase Request - [PQ-000002]

Home Edit

Approve Preview Print Edit Void Delete Show Instant Info Document Navigation Copy from other Purchase Request Copy to a new Purchase Request Copy Purchase Request Check Transferred To Status Transfer Document

Requested By Mark Purchase Request No PQ-000002
Description PURCHASE REQUEST Date 28/08/2018
Purchase Location HQ Approval User

Item Code	Description	Fur...	Location	UOM	Qty	Creditor Code	Creditor Name
SE200I	SONY ERICSSON W200I	...	HQ	PCS	5		

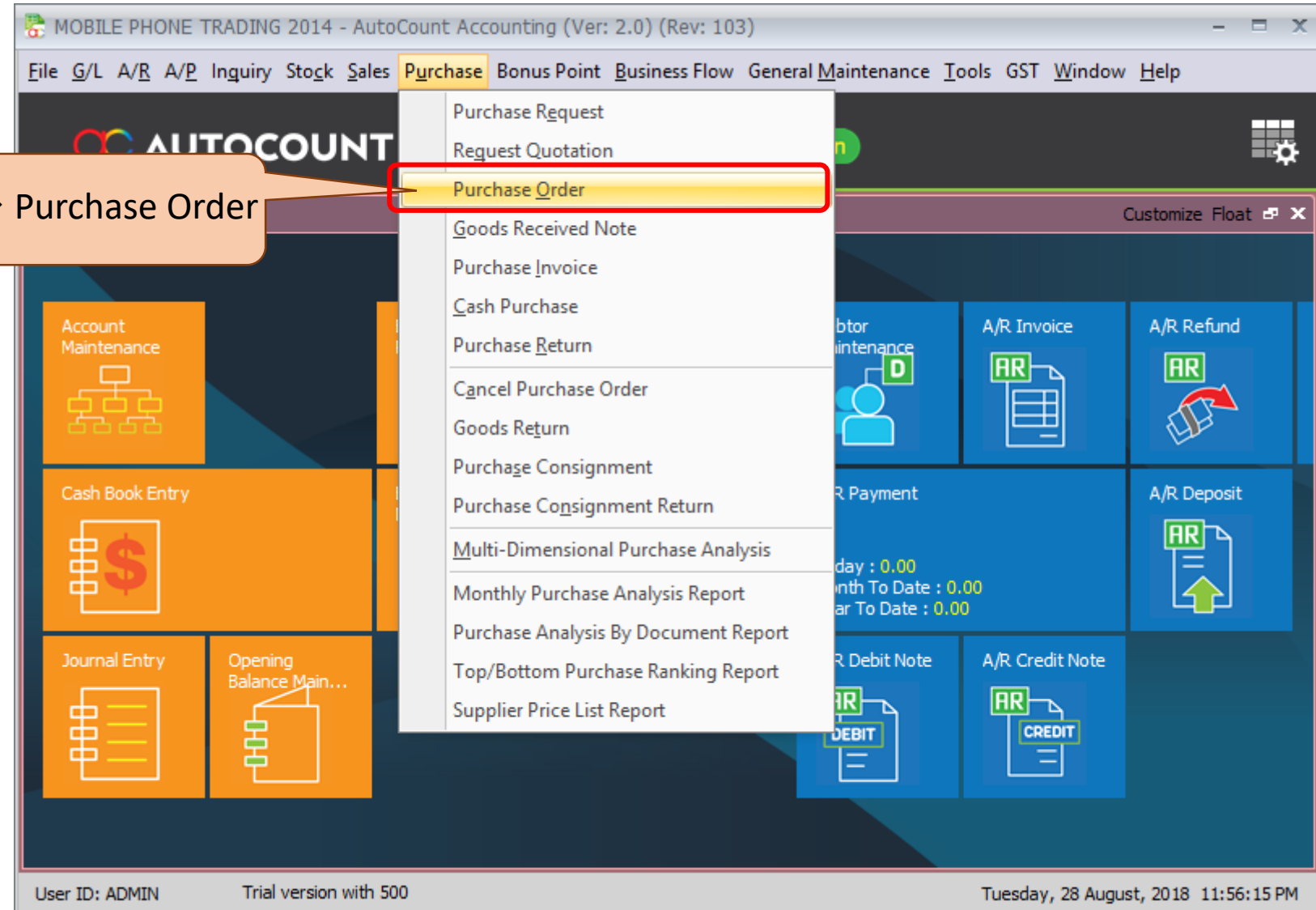
USER don't have the access right for Approval, so the Approval User box is not update automatically

2.5. Transfer to Other Documents

- PQ can be transfer to;
 - Request Quotation (RQ)
 - Purchase Order (PO)
- PQ without approval, cannot be transfer to other documents.

2.5.1. Transfer to Purchase Order (PO)

a. Go to Purchase → Purchase Order



2.5.1. Transfer to Purchase Order (PO)


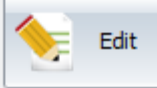


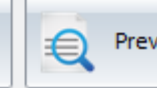





b. Click on New

Purchase Order - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)

File G... R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow **General Maintenance** Tools GST Window Help | Report Others

Purchase Order

Hint: In this Purchase Order window, you can create, modify, or delete purchase order for your supplier.

 New  Edit  View  Find  Preview  Print  Print Listing  Delete  Refresh  View Flow ☒ Show this grid at startup

Drag a column header here to group by that column

	Doc. No.	Date	Creditor C...	Creditor N...	Agent	Curr. Code	Curr. Rate	Inclusive?	Sub-Tot...	GST	Local GST	Total	Local Total	Cancelled
>	PO-000001	14/10/2014	400-B001	BEST PHO...		MYR	1	No	199,900...	11,994.00	11,994.00	211,894.00	211,894.00	

2.5.1. Transfer to Purchase Order (PO)

New Purchase Order - [Next Possible No: PO-000003] - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0)

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Group Total Discount Item Package Item Search Show Instant Info Show Instant...

Copy Purchase Order Transfer From Purchase Request Check Transferred To Status Transfer Document

Creditor Name Address Branch Purchase Location HQ

P/O No <<New>> Date 28/08/2014 Credit Term Purchase Agent Ship Via Ship Info

c. Click on 'Transfer From Purchase Request'

Item Code	Description	...	Location	Dept. ...	Proj. ...	UOM	Qty	Unit Pr...	Discount	SubTotal	GST...	GST...	GST	Total (ex)	Total (inc)
-----------	-------------	-----	----------	-----------	-----------	-----	-----	------------	----------	----------	--------	--------	-----	------------	-------------

Purchase Order

2.5.1. Transfer to Purchase Order (PO)

Transfer from Purchase Request

Partial Item Transfer

Check All UnCheck All Filter On This Creditor Filter On This Doc No ☐ Show All Item

	...	New Qty	New UOM	Bal. Qty	Bal. UOM	Org Qty	Org UOM	Creditor C...	Company N...	Doc No	Item Code	Description
>	<input type="checkbox"/>		PCS	1.00	PCS	1	PCS			PQ-000001	LG800	LG KE800

d. Supposed there are two document for PQ created earlier, but here only shows PQ-000001

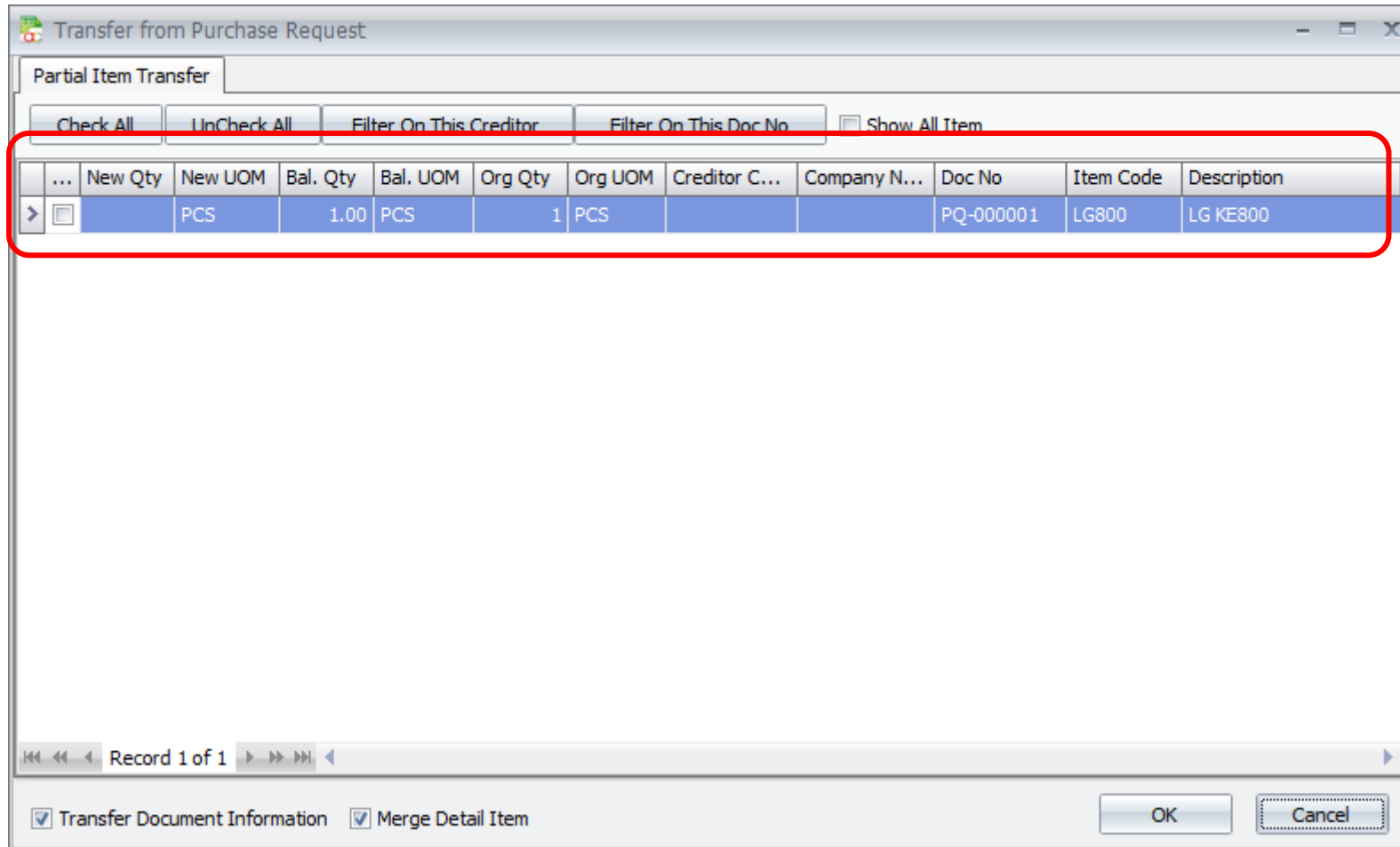
Record 1 of 1

☒ Transfer Document Information ☒ Merge Detail Item

OK Cancel

2.5.1. Transfer to Purchase Order (PO)

- In order to make PQ appearing in transfer options, the **APPROVAL** is needed.



Transfer from Purchase Request

Partial Item Transfer

Check All UnCheck All Filter On This Creditor Filter On This Doc No Show All Item

	...	New Qty	New UOM	Bal. Qty	Bal. UOM	Org Qty	Org UOM	Creditor C...	Company N...	Doc No	Item Code	Description
>	<input type="checkbox"/>		PCS	1.00	PCS	1	PCS			PQ-000001	LG800	LG KE800

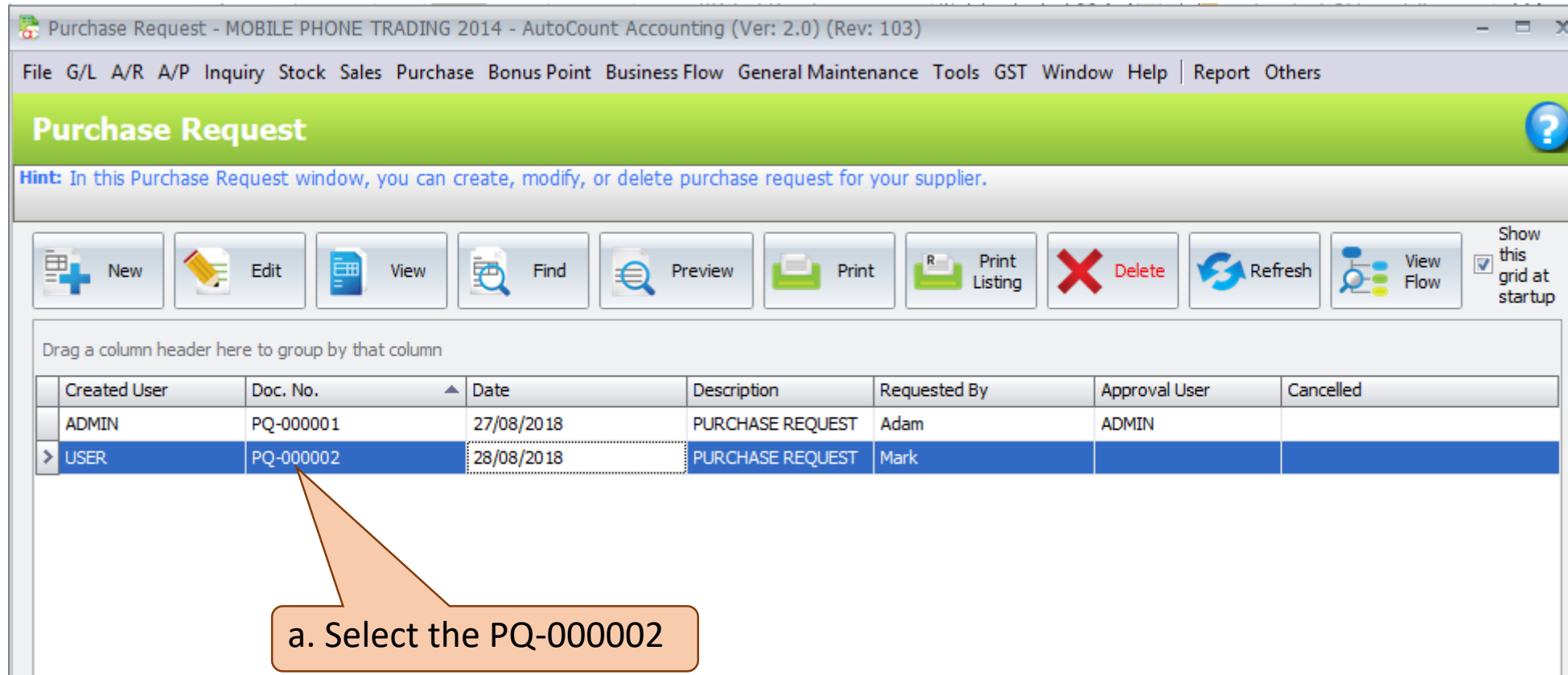
Record 1 of 1

☒ Transfer Document Information ☒ Merge Detail Item

OK Cancel

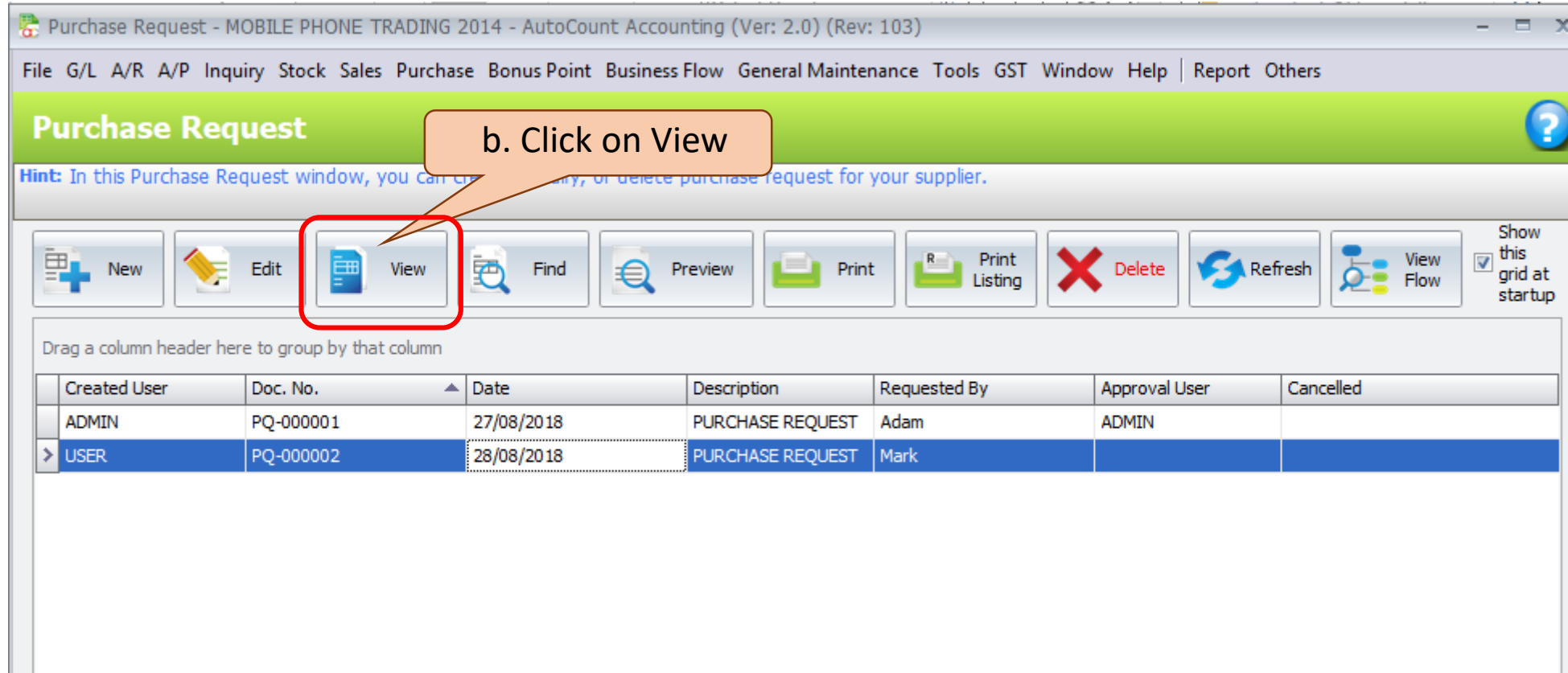
2.6. Purchase Request (PQ) Approval

- To approve the PQ, go back to the PQ listing, and view the document.

The screenshot shows the 'Purchase Request' window in AutoCount Accounting. The window title is 'Purchase Request - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)'. The menu bar includes File, G/L, A/R, A/P, Inquiry, Stock, Sales, Purchase, Bonus Point, Business Flow, General Maintenance, Tools, GST, Window, Help, Report, and Others. The main area has a green header with the title 'Purchase Request' and a hint: 'In this Purchase Request window, you can create, modify, or delete purchase request for your supplier.' Below the header is a toolbar with buttons for New, Edit, View, Find, Preview, Print, Print Listing, Delete, Refresh, and View Flow. A checkbox 'Show this grid at startup' is also present. The main data area contains a table with columns: Created User, Doc. No., Date, Description, Requested By, Approval User, and Cancelled. The table has two rows: one for ADMIN with Doc. No. PQ-000001 and Date 27/08/2018, and another for USER with Doc. No. PQ-000002 and Date 28/08/2018. The second row is highlighted in blue. An orange callout box points to the second row with the text 'a. Select the PQ-000002'.

2.6. Purchase Request (PQ) Approval

- To approve the PQ, go back to the PQ listing, and view the document.

The screenshot shows the 'Purchase Request' window in AutoCount Accounting. The window title is 'Purchase Request - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)'. The menu bar includes File, G/L, A/R, A/P, Inquiry, Stock, Sales, Purchase, Bonus Point, Business Flow, General Maintenance, Tools, GST, Window, Help, Report, and Others. The main area has a green header with 'Purchase Request' and a blue question mark icon. Below the header is a hint: 'Hint: In this Purchase Request window, you can create, edit, or delete purchase request for your supplier.' A toolbar contains buttons for New, Edit, View, Find, Preview, Print, Print Listing, Delete, Refresh, and View Flow. The 'View' button is highlighted with a red box and a callout bubble that says 'b. Click on View'. Below the toolbar is a table with columns: Created User, Doc. No., Date, Description, Requested By, Approval User, and Cancelled. The table has two rows: one for ADMIN with Doc. No. PQ-000001 and Date 27/08/2018, and another for USER with Doc. No. PQ-000002 and Date 28/08/2018. The second row is highlighted in blue.

Purchase Request - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0) (Rev: 103)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help | Report Others

Purchase Request

Hint: In this Purchase Request window, you can create, edit, or delete purchase request for your supplier.

New Edit **View** Find Preview Print Print Listing Delete Refresh View Flow Show this grid at startup

Drag a column header here to group by that column

Created User	Doc. No.	Date	Description	Requested By	Approval User	Cancelled
ADMIN	PQ-000001	27/08/2018	PURCHASE REQUEST	Adam	ADMIN	
> USER	PQ-000002	28/08/2018	PURCHASE REQUEST	Mark		

2.6. Purchase Request (PQ) Approval

c. To approve the PR, need to click on 'Approve' button.

View Purchase Request - [PQ-000002]

Home Edit

Approve Preview Print Edit Void Delete Show Instant Info Document Navigation Copy from other Purchase Request Copy to a new Purchase Request Check Transferred To Status Transfer Document

Requested By Mark Purchase Request No PQ-000002
 Description PURCHASE REQUEST Date 28/08/2018
 Purchase Location HQ Approval User

Item Code	Description	Fur...	Location	UOM	Qty	Creditor Code	Creditor Name
SE200I	SONY ERICSSON W200I	...	HQ	PCS	5		

2.6. Purchase Request (PQ) Approval

View Purchase Request - [PQ-000002](1)

Home Edit

Approve Preview Print Edit Void Delete Show Instant Info Document Navigation Copy from other Purchase Request Copy to a new Purchase Request Check Transferred To Status Transfer Document

Requested By Mark Purchase Request No PQ-000002
Description PURCHASE REQUEST Date 28/08/2018
Purchase Location HQ Approval User

Item Code	Description	Fur...	Location	UOM	Qty	Creditor Code	Creditor Name
> SE200I	SONY ERICSSON W200I	...	HQ	PCS	5		

d. Click on Yes.

AutoCount Accounting

? Do you really want to approve Purchase Request PQ-000002 ?

Yes No

2.6. Purchase Request (PQ) Approval

View Purchase Request - [PQ-000002](1)

Home Edit

Preview Print Edit Void Delete Show Instant Info Document Navigation Copy from other Purchase Request Copy to a new Purchase Request Check Transferred To Status Transfer Document

Requested By Mark Purchase Request No PQ-000002

Description PURCHASE REQUEST Date 28/08/2018

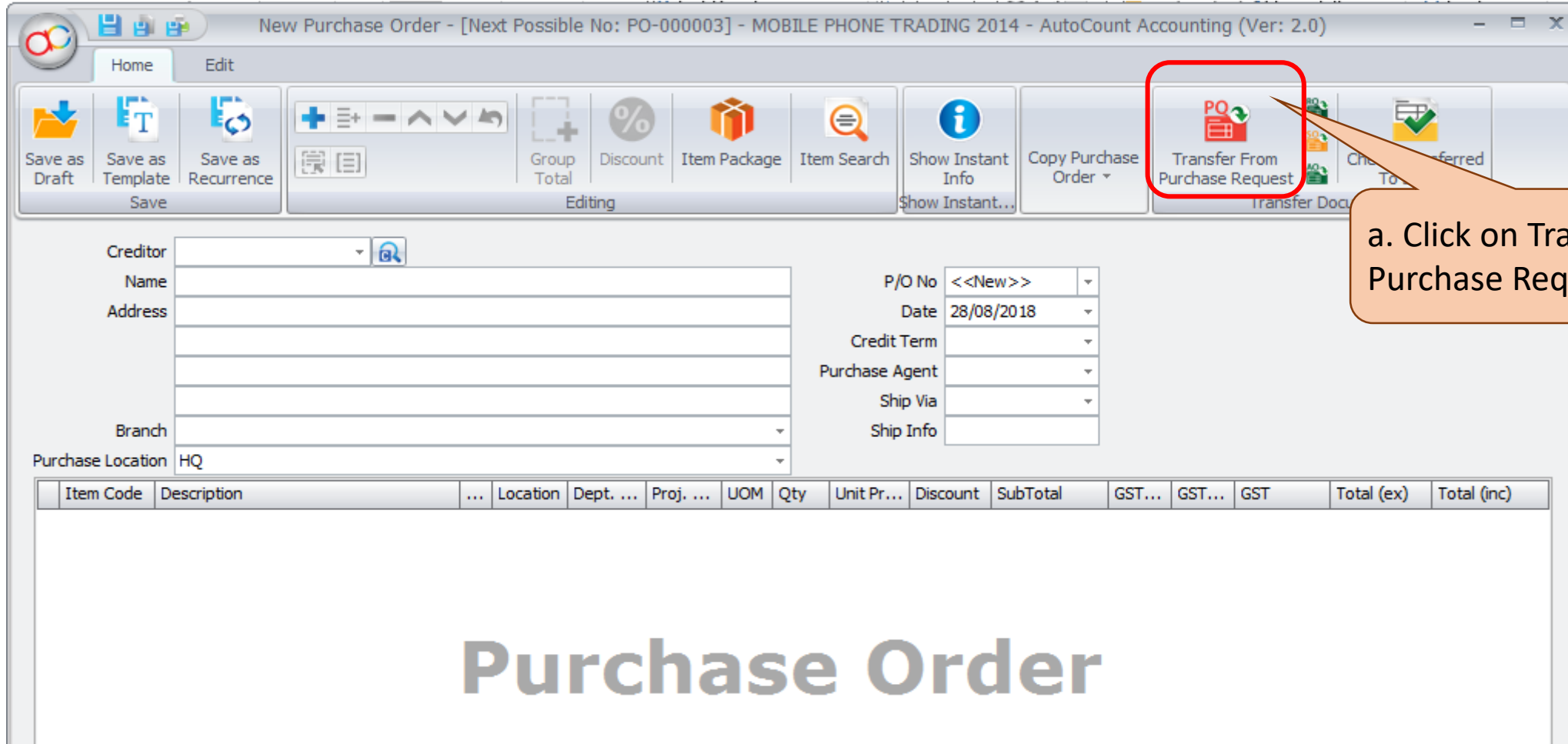
Purchase Location HQ Approval User ADMIN

Item Code	Description	Fur...	Location	M	Qty	Creditor Code	Creditor Name
SE200I	SONY ERICSSON W200I	...	HQ		5		

e. Then, the Approval User box is updated.

2.7. Transfer From Purchase Request (PQ)

- Then, can go back to create new PO (follow steps in 2.5.1. (a) to (c)) and use Transfer from Purchase Request functions.



New Purchase Order - [Next Possible No: PO-000003] - MOBILE PHONE TRADING 2014 - AutoCount Accounting (Ver: 2.0)

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Group Total Discount Item Package Item Search Show Instant Info Copy Purchase Order Transfer From Purchase Request

Creditor Name Address Branch Purchase Location HQ

P/O No <<New>> Date 28/08/2018 Credit Term Purchase Agent Ship Via Ship Info

Item Code	Description	...	Location	Dept. ...	Proj. ...	UOM	Qty	Unit Pr...	Discount	SubTotal	GST...	GST...	GST	Total (ex)	Total (inc)

Purchase Order

a. Click on Transfer From Purchase Request

2.7. Transfer From Purchase Request (PQ)

Transfer from Purchase Request

Partial Item Transfer

☐ Show All Item

...	New Qty	New UOM	Bal. Qty	Bal. UOM	Org Qty	Org UOM	Creditor C...	Company N...	Doc No	Item Code	Description
<input type="checkbox"/>		PCS	5.00	PCS	5	PCS			PQ-000002	SE200I	SONY ERICSSON W200I
<input type="checkbox"/>		PCS	1.00	PCS	1	PCS			PQ-000005	LG800	LG KE800

Record 1 of 2

☒ Transfer Document Information
 ☒ Merge Detail Item

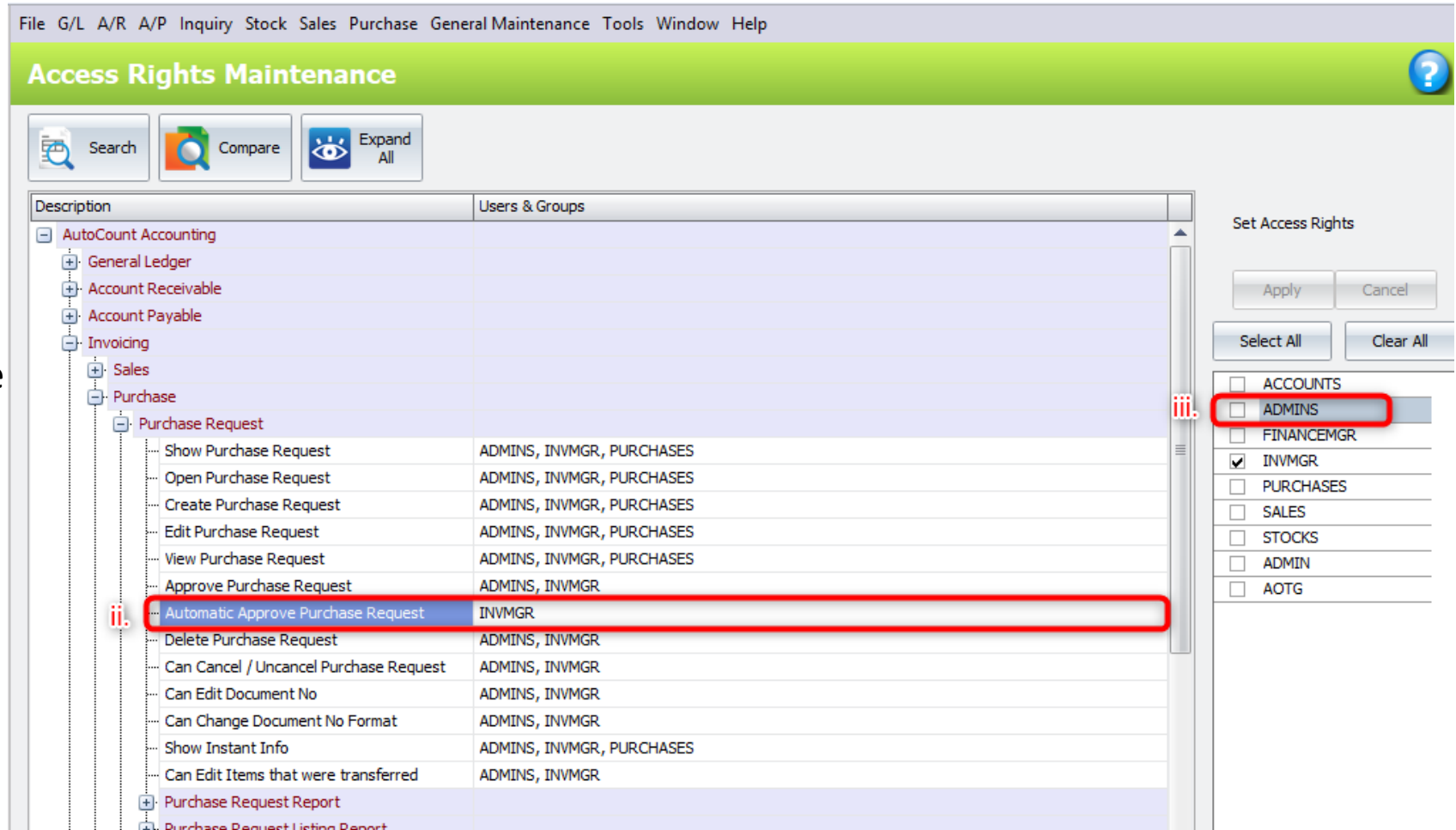
b. Now, both document is appeared, and ready to transfer to PO

2.8. Manual Approval Purchase Request (PQ)

- By default, certain user / user group will have access right to 'Automatically Approve' the PQ
- If user does not wish to automatically approve the PQ, then just need to remove the access right from user maintenance

Steps:

- Go to General Maintenance
→ Access Right Maintenance
- Expand up to Purchase Request, and highlight the "Automatic Approve Purchase Request"
- Then, untick "ADMINS" from the Access Rights record
- User from ADMINS group will no longer approve the PQ automatically after this.



File G/L A/R A/P Inquiry Stock Sales Purchase General Maintenance Tools Window Help

Access Rights Maintenance

Search Compare Expand All

Description	Users & Groups
AutoCount Accounting	
General Ledger	
Account Receivable	
Account Payable	
Invoicing	
Sales	
Purchase	
Purchase Request	
Show Purchase Request	ADMINS, INVMGR, PURCHASES
Open Purchase Request	ADMINS, INVMGR, PURCHASES
Create Purchase Request	ADMINS, INVMGR, PURCHASES
Edit Purchase Request	ADMINS, INVMGR, PURCHASES
View Purchase Request	ADMINS, INVMGR, PURCHASES
Approve Purchase Request	ADMINS, INVMGR
Automatic Approve Purchase Request	INVMGR
Delete Purchase Request	ADMINS, INVMGR
Can Cancel / Uncancel Purchase Request	ADMINS, INVMGR
Can Edit Document No	ADMINS, INVMGR
Can Change Document No Format	ADMINS, INVMGR
Show Instant Info	ADMINS, INVMGR, PURCHASES
Can Edit Items that were transferred	ADMINS, INVMGR
Purchase Request Report	
Purchase Request Listing Report	

Set Access Rights

Apply Cancel

Select All Clear All

- ☐ ACCOUNTS
- ☒ ADMINS
- ☐ FINANCEMGR
- ☒ INVMGR
- ☐ PURCHASES
- ☐ SALES
- ☐ STOCKS
- ☐ ADMIN
- ☐ AOTG

Thank You

A c c o u n t | B i l l i n g | S t o c k | P O S | P a y r o l l



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